AI RFQ Assistant

Illustrated Operating Guide

Workflow version 1.0

Training version 1.0

Status: DEMO

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Purpose: reduce manual first-pass RFQ reading while keeping commercial decisions under human control.

1. Workflow purpose

Use the AI RFQ Assistant to classify an incoming customer request, extract key commercial and technical information, identify missing data and risk flags, and prepare a structured internal quotation-preparation brief. The AI accelerates intake; it does not approve commercial commitments.

2. Who should use it

- Sales Operations
- Inside Sales
- Quotation Preparation
- Other approved employees who understand product, pricing and escalation rules

3. Before you start

SOURCE MATERIAL

- Original RFQ, email or approved attachment
- Confirm it belongs to the correct customer

APPROVED TOOL

- Use only the approved AI RFQ Assistant
- Never paste customer material into an unapproved public AI tool

REFERENCE ACCESS

- Product/service references
- Internal quotation process

HUMAN RESPONSIBILITY

- Know the approval path
- Know when to stop and escalate

4. Operating procedure

1	**Confirm the RFQ source** Check customer, reference and source material before any AI processing.
2	**Open the approved assistant** Use the approved company workflow only.
3	**Submit the source material** Provide the complete approved RFQ input. If the source is incomplete, say so rather than inventing data.
4	**Review the structured output** Expect customer identity, request summary, items/services, quantities, dates, missing information, risk flags, assumptions and proposed next action.
5	**Perform the human check** Compare every critical field against the original RFQ source.
6	**Correct or escalate** Fix extraction errors. Stop and escalate when specifications, product mapping, legal/compliance language, unusual payment terms or contractual penalties need specialist review.
7	**Approve the internal brief** Only after human review may the result move to quotation preparation or another approved internal step.
8	**Keep AI output internal** Do not send unreviewed AI output to the customer.

5. What a normal output looks like

The assistant should separate extracted facts, missing information, risk flags, assumptions and required next actions.

FIELD	EXAMPLE
Customer	Northline Industrial Systems GmbH
RFQ reference	NIS-2026-0917-04
Request type	Product quotation
Requested items	Industrial sensor assembly X4 - 24 pcs Gateway controller G2 - 6 pcs
Requested delivery	Before 30 October 2026
Missing / unclear	Installation location; Incoterm; warranty extension
Contract / risk flags	Liquidated damages for late delivery
Human checks	Product mapping; stock/lead time; clause review; pricing authority
Next action	Escalate clause; request logistics info; prepare internal price calculation

6. Mandatory human verification

- Customer identity
- Quantities
- Requested delivery date
- Product / service mapping
- Contractual requirements
- Pricing inputs and authority
- AI assumptions

No confidence score removes the human-check requirement.

7. Stop and escalate when

SPECIFICATIONS

- Request contains unclear or conflicting specifications

CONTRACT

- Contractual penalties or unusual obligations appear

PRODUCT

- Product/service mapping is uncertain

PAYMENT

- Unusual payment terms are requested

LEGAL / COMPLIANCE

- Legal, compliance or regulated wording is detected

SOURCE CONFLICT

- AI output conflicts with customer source material

8. Common failures and response

FAILURE	REQUIRED RESPONSE
AI invents a missing term	Mark it unknown; return to source or customer clarification.
Quantity is extracted incorrectly	Correct from source before proceeding.
Wrong product mapping	Stop and verify with product/technical ownership.
Penalty language is overlooked	Escalate before commercial commitment.
Employee sends AI draft externally	Stop. This workflow is an internal preparation layer unless a separate reviewed outbound step is approved.

9. Knowledge verification

#	QUESTION	CORRECT PRINCIPLE
1	Delivery date extracted by AI: what happens next?	Verify it against the RFQ source.
2	May high-confidence AI approve final pricing?	No.
3	RFQ contains liquidated damages. What next?	Escalate the contractual clause.
4	Which critical fields can bypass human verification?	None.
5	Can unreviewed AI output be sent to the customer?	No.

Demo pass threshold: 4 / 5 correct. Completion also requires acknowledgement.

10. Acknowledgement

I confirm that I have reviewed the AI RFQ Assistant operating guidance and understand that AI output must be checked against the customer source before the workflow proceeds to quotation preparation or customer communication.

11. Version control

Workflow version	1.0
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